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FEBRUARY 12, 1992

R&I RESTAURANTS & INSTITUTIONS

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R&I PRESENTS

AMERICA'S CHOICE IN CHAINS

PLUS: ASIAN INSPIRATIONS...BEST MORALE BUILDERS...
THE GREAT PASTA SAUCES...SPRUCE-UP GUIDE

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SPRING MENU PLANNER

SEASONAL FOODS...SPRING PROMOTIONS...LIGHTER FARE

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In salads, soups or as accompaniments, garden-fresh greens and baby vegetables say "spring" on menus.

Marinara, primavera, Alfredo—the great pasta sauces stage a comeback.

Cleanliness, atmosphere and variety prove decisive with diners.

By Rajan Chaudhry

R&I PRESENTS

America's Choice in Chains

If 1992's Choice in Chains winners are any indication, what customers want are clean, comfortable restaurants, broad menus and first-rate food.

Comparing the overall winners from each segment yields some surprising parallels.

Nine winners rate as the cleanest chains in their categories; the other two finish second in their respective categories in cleanliness.

Likewise, nine winners take top honors in their segments for atmosphere. One winner places second in its category for atmosphere and the other finishes third.

Seven of the overall winners score highest in their categories for menu variety.

And six top their segment in food quality.

Of the other attributes measured by the Choice in Chains Survey—value, service and convenience—value is notable for its seemingly small effect on overall satisfaction. In fact, only one overall winner, Red Lobster, scores highest in its segment for value.

Five winners top their segments for service. Only two score highest in their segments for convenience.

Furthermore, when it comes to number of units or size of advertising budget, it appears that bigger is not necessarily better: Only two favorites, Pizza Hut and Red Lobster, score highest in their segments for awareness. And only three chains of choice—The Olive Garden, Pizza Hut and Red Lobster—led their segments in patronage in the 12 months preceding the survey.

WENDY'S WINS AGAIN

For the fourth year running, Wendy's is America's favorite place to grab a burger. Sonic leaps four spots from last year to finish second, while McDonald's slips one notch to third.

Choice in Chains also breaks out scores demographically and geographically. In addition to leading its segment in food quality, menu variety and atmosphere, Wendy's scores highest with both families (3.62) and working women (3.60).

Households with children also give high marks to

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Grandy's scores for atmosphere are the highest among all fast-food chains in this year's survey.

1992 WINNERS

BURGERS
Wendy's
Columbus, Ohio

CAFETERIAS
Luby's Cafeterias
San Antonio

CHICKEN
Grandy's
Lewisville, Texas

DINNER HOUSES
The Olive Garden
Orlando, Fla.

FAMILY DINING
Cracker Barrel
Old Country Store
Lebanon, Tenn.

MEXICAN
Garcia's Mexican
Restaurants
Scottsdale, Ariz.

PIZZA
Pizza Hut
Wichita, Kan.

SANDWICHES
Rax Restaurants
Columbus, Ohio

SEAFOOD
Red Lobster
Orlando, Fla.

STEAKHOUSES
Golden Corral
Raleigh, N.C.

SWEETS
Baskin-Robbins
Glendale, Calif.

Luby's edges out The Olive Garden for survey's highest overall rating.

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Sonic (3.58) and McDonald's (3.53). But McDonald's (3.53) edges out Sonic (3.52) for second place among working women.

Wendy's posts its highest ratings in the South (3.72) and with senior citizens (3.93).

LUBY'S CAPTURES CAFETERIA CROWN

R&I folded buffet chains into the cafeteria segment this year, but that didn't change the outcome: For the third consecutive year, Luby's beats all comers. In fact, Luby's overall satisfaction score (3.95) is the highest in the industry, ahead of The Olive Garden (3.94) and segment rival Morrison's (3.93).

Among cafeteria and buffet chains, Luby's sweeps the quality, variety, service, cleanliness and convenience classifications.

While newcomers to the segment King's Table and Old Country Buffet post the highest value scores in the entire survey—4.08 and 4.05, respectively—they trail the cafeteria chains in nearly all other measures.

Customers vote Cracker Barrel Old Country Store's food quality and variety best in the family-dining segment.

ABOUT THE SURVEY

***R&I*'s Choice in Chains was conducted in October 1991 by National Family Opinion. The Toledo, Ohio-based research firm mailed questionnaires to 4,000 households nationwide, out of which 69% responded.**

Customers rated each chain on a scale of 1 to 5 in seven categories: food quality, menu variety, value, service, atmosphere, cleanliness and convenience. Their scores were averaged to determine an overall index of satisfaction.

Only chains that logged at least 100 visits in the preceding 12 months were included in the final scoring. In the event of a tie, the higher ranking went to the chain with the larger patronage.

Choice in Chains has a margin of error of plus or minus 5%.

Luby's finishes first in its segment among households with children (3.88), ahead of Morrison's (3.81) and Furr's (3.80). Working women, on the other hand, rank Morrison's highest (3.92), followed by Luby's (3.87) and Piccadilly (3.84).

Luby's highest satisfaction figures come from customers in the West (4.13) and those over 65 years of age (4.36). The chain also holds strong appeal for those in the 36 to 45 age group (4.13).

Households earning less than $25,000 per year give Luby's taller marks than any other income group. But satisfaction also runs high among households making $45,000 and over.

GRANDY'S PLUCKS COMPETITION

Grandy's repeats as winner in the chicken segment, prevailing over runners-up El Pollo Loco and Lee's Famous Recipe.

Grandy's walks away with the high scores in atmosphere and cleanliness. Patrons also pick Grandy's as No. 1 in its segment for menu variety.

The chain's atmosphere score (3.58) places it first among all fast-food chains, while its variety score (3.70) trails only Baskin-Robbins (3.94) and Wendy's (3.81).

Among working women, Grandy's scores

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FULL SERVICE

The following operations posted the top scores among full-service chains in this year's survey:

OVERALL

1. Luby's	3.95
2. The Olive Garden	3.94
3. Morrison's	3.93

FOOD QUALITY

1. Steak & Ale	4.29
2. Stuart Anderson's Black Angus	4.25
3. The Olive Garden	4.23

MENU VARIETY

1. T.G.I. Friday's	4.27
2. Red Lobster	4.20
3. Houlihan's	4.12

VALUE

1. PoFolks	3.86
2. Shoney's	3.77
3. Cracker Barrel	3.77

SERVICE

1. The Olive Garden	3.98
2. Steak & Ale	3.95
3. Cracker Barrel	3.92

ATMOSPHERE

1. The Olive Garden	4.20
2. Steak & Ale	4.05
3. Cracker Barrel	4.02

CLEANLINESS

1. The Olive Garden	4.09
2. Cracker Barrel	4.01
3. Applebee's	3.95

CONVENIENCE

1. Pizza Hut	3.62
2. Shoney's	3.57
3. Applebee's	3.49

The Olive Garden is the favorite chain of American families.

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3.62, well above the numbers of next-best El Pollo Loco (3.45) and Lee's (3.43). Grandy's also scores first among households with children (3.65), ahead of No. 2 Lee's (3.54) and No. 3 Chick-fil-A (3.48).

OLIVE GARDEN DOMINATES DINNER HOUSES

Since ascending to the No. 1 spot in its segment in 1990, The Olive Garden has emerged as one of the dominant chains in the survey.

The Olive Garden's service, atmosphere, cleanliness and overall scores are not only the highest among dinner houses, they are the highest among full-service chains. And The Olive Garden's overall rating by families (3.96) is unmatched in this year's survey.

The Italian dinner-house chain's highest satisfaction numbers come from patrons in the Northeast (4.08) and those 56 to 65 years old (4.01). The chain also scores well with the affluent 46 to 55 age group, an enviable position given the graying population.

CRACKER BARREL BRINGS HOME THE BACON

With 13 qualifying chains, family dining is the most crowded segment of the survey--which makes Cracker Barrel's superior performance all the more impressive.

With the exception of the value category, in which it finished second to PoFolks, and convenience, Cracker Barrel sweeps every attribute contest in the segment: overall, food quality, menu variety, service, atmosphere and cleanliness.

Furthermore, Cracker Barrel's appeal is exceptionally broad. Not only does the chain finish first in its segment among working women (3.92) and households with children (3.90), but its popularity is almost as strong with those 56 to 65 (3.93) as it is with those 45 and under (3.96).

GARCIA'S GRABS THE GOLD

This year, Garcia's unseated two-time winner Chi-Chi's to claim the title of America's favorite Mexican chain.

Customers vote Garcia's food quality, service, atmosphere and cleanliness the best in the segment.

Garcia's highest marks come from those over 65 (4.62) and those 56 to 65 (4.00). But the chain also scores very well among 36- to 45-year-olds (3.91). And it finds favor with a slightly more educated clientele, with satisfaction peaking at 3.87 among customers who have completed some college.

Likewise, households with children (3.89) and working women (3.82) both rate Garcia's well above both its quick- and full-service Mexican-theme competitors.

PIZZA HUT DELIVERS SLICE OF SATISFACTION

Despite facing two of the strongest niche players in the industry, Little Caesars and Domino's, Pizza Hut's well-balanced attack once again proved superior.

Pizza Hut prevails both in atmosphere and cleanliness. Customers rate the chain second in convenience as well as quality, and give it a respectable third place in vari-

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Rax's scores in menu variety and atmosphere lead its segment. Its marks for cleanliness are second among fast-food chains.

FAST FOOD

The following posted the top scores among fast-food chains in this year's survey:

OVERALL	
1. Baskin-Robbins	3.70
2. Wendy's	3.66
3. TCBY	3.64
FOOD QUALITY	
1. Häagen-Dazs	4.47
2. Baskin-Robbins	4.28
3. T.J. Cinnamons	4.25
MENU VARIETY	
1. Baskin-Robbins	3.94
2. Wendy's	3.81
3. Grandy's	3.70
VALUE	
1. Little Caesars	3.97
2. Taco Bell	3.84
3. White Castle	3.82
SERVICE	
1. Sonic	3.76
2. Domino's	3.69
3. El Pollo Loco	3.69
ATMOSPHERE	
1. Grandy's	3.58
2. Long John Silver's	3.46
3. Wendy's	3.41
CLEANLINESS	
1. TCBY	3.81
2. Rax	3.78
3. Baskin-Robbins	3.70
CONVENIENCE	
1. McDonald's	3.99
2. Domino's	3.96
3. Sonic	3.81

Baskin-Robbins' overall score is highest among all quick-service chains.

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ety. However, the segment leader shows a few chinks in its armor. Rival Little Caesars proves that it is not only the best value among pizza chains, but the best value in fast food. Its score (3.97) places it ahead of value leaders like Taco Bell (3.84) and White Castle (3.82).

Also, Domino's, which built its franchise on 30-minute delivery, beats Pizza Hut soundly in the areas of convenience (3.96 vs. 3.62) and service (3.69 vs. 3.55). Domino's finishes second in both categories among fast-food chains.

RAX CLEANS UP IN SANDWICH SEGMENT

For the third time in four years, Rax is the people's choice among sandwich chains.

In addition to its segment-high scores in variety and atmosphere, Rax's marks for cleanliness (3.78) are second only to TCBY's in the fast-food arena.

Rax also scores highest among sandwich chains with families and working women (both 3.53).

The chain's strongest satisfaction marks come from the Northeast. According to the survey, Rax pulls best at both ends of the age spectrum: patrons older than 65 (3.64) and those 35 and under (3.51).

RED LOBSTER EXTENDS STREAK

With the exception of convenience, where its quick-service counterparts have the edge, Red Lobster takes every title the seafood segment has to offer, beginning with atmosphere and ending with variety.

To some extent, as the only full-service chain in the segment, Red Lobster's high scores are to be expected. If Red Lobster were included in the family-restaurant category, it would place second in overall satisfaction to Cracker Barrel. And if compared with dinner houses, Red Lobster's scores would leave it in the middle of the pack.

The Olive Garden's service, atmosphere, cleanliness and overall scores are the highest among full-service chains.

GOLDEN CORRAL ROPES STEAKHOUSE TITLE

With five different winners in as many years, the steakhouse segment is traditionally the most hotly contested in the survey. And this year is no disappointment: Golden Corral (3.87), takes only cleanliness and food quality, yet manages to scrape by Quincy's (3.85) for the top spot.

Golden Corral's highest ratings come from customers in the 56 to 65 age bracket, as well as those households with incomes between $15,000 and $34,900 per year. The chain's strong showing among households with children (3.90) places it in the industry's top three for that category.

Among the other contenders, Quincy's scores highest in service, atmosphere and convenience, while consumers vote Ryan's first in variety and value.

BASKIN-ROBBINS: JUST DESSERTS

Baskin-Robbins' 3.70 overall rating is enough to move it past 1989 sweets category winner TCBY and give the ice-cream chain its second consecutive win.

The chain's score is the highest recorded this year for a quick-service chain.

In food quality, Baskin-Robbins finishes second only to Häagen-Dazs in its segment and among all fast-food chains. It scores highest among fast-food chains for menu variety and trails only TCBY and Rax in perceived cleanliness.

Baskin-Robbins boasts the best variety, atmosphere and convenience in its segment, according to customers polled. . . . And the customers are always right.

FAMILY FAVORITES

Households with children rate the following chains highest:

OVERALL

1. The Olive Garden	3.96
2. Cracker Barrel	3.90
3. Golden Corral	3.90

FOOD QUALITY

1. Häagen-Dazs	4.53
2. Steak & Ale	4.35
3. Baskin-Robbins	4.26

MENU VARIETY

1. T.G.I. Friday's	4.35
2. Luby's	4.35
3. Furr's	4.23

VALUE

1. Old Country Buffet	4.04
2. Little Caesars	3.99
3. Furr's Cafeterias	3.95

SERVICE

1. Stuart Anderson's Black Angus	4.04
2. The Olive Garden	4.03
3. Golden Corral	3.94

ATMOSPHERE

1. The Olive Garden	4.24
2. Houlihan's	4.17
3. Cracker Barrel	4.14

CLEANLINESS

1. The Olive Garden	4.11
2. Cracker Barrel	3.98
3. Applebee's	3.94

CONVENIENCE

1. Domino's	3.98
2. McDonald's	3.92
3. Sonic	3.82

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Segment/Chain	Overall index*	Food quality	Menu variety	Good value	Good service	Atmosphere	Cleanliness	Convenience
BURGERS								
Wendy's	3.66	3.86	3.81	3.59	3.63	3.41	3.62	3.68
Sonic	3.59	3.70	3.61	3.62	3.76	3.21	3.40	3.81
McDonald's	3.58	3.45	3.54	3.54	3.55	3.33	3.68	3.99
Hardee's	3.47	3.51	3.55	3.43	3.42	3.25	3.48	3.65
Burger King	3.44	3.53	3.43	3.36	3.39	3.14	3.48	3.76
Whataburger	3.43	3.80	3.34	3.49	3.49	3.10	3.41	3.42
Carl's Jr.	3.41	3.57	3.54	3.24	3.31	3.16	3.54	3.52
Jack In The Box	3.40	3.48	3.69	3.26	3.30	3.09	3.40	3.57
Krystal	3.40	3.46	3.19	3.75	3.42	3.09	3.27	3.60
Rally's	3.38	3.54	3.09	3.72	3.57	2.84	3.31	3.58
White Castle	3.31	3.35	3.03	3.82	3.47	2.93	3.28	3.26
CAFETERIAS								
Luby's Cafeterias	3.95	4.14	4.34	3.85	4.00	3.69	3.95	3.71
Morrison's	3.93	4.07	4.28	3.94	3.94	3.76	3.90	3.62
Piccadilly Cafeterias	3.85	4.04	4.21	3.77	3.83	3.68	3.84	3.60
Furr's Cafeterias	3.82	3.81	4.25	3.94	3.81	3.52	3.86	3.52
Old Country Buffet	3.81	3.94	4.19	4.05	3.69	3.61	3.75	3.47
King's Table	3.69	3.69	4.05	4.08	3.70	3.33	3.59	3.38
CHICKEN								
Grandy's	3.64	3.79	3.70	3.59	3.59	3.58	3.70	3.51
El Pollo Loco	3.58	4.11	3.36	3.72	3.69	3.24	3.55	3.43
Lee's Famous Recipe	3.54	3.83	3.53	3.58	3.57	3.29	3.54	3.45
Chick-fil-A	3.44	3.91	3.25	3.33	3.56	3.13	3.51	3.42
Popeyes	3.43	3.86	3.45	3.50	3.37	3.15	3.29	3.41
KFC	3.41	3.70	3.25	3.38	3.43	3.11	3.42	3.59
Church's	3.36	3.58	3.30	3.56	3.36	3.07	3.24	3.43
DINNER HOUSES								
The Olive Garden	3.94	4.23	4.08	3.60	3.98	4.20	4.09	3.39
Steak & Ale	3.89	4.29	4.00	3.55	3.95	4.05	3.94	3.48
Stuart Anderson's	3.87	4.25	3.97	3.68	3.91	3.98	3.88	3.45
T.G.I. Friday's	3.84	4.13	4.27	3.54	3.80	3.98	3.84	3.29
Houlihan's	3.81	4.13	4.12	3.46	3.68	4.10	3.92	3.29

*Overall index is the average of the seven attribute scores

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Segment/Chain	Overall index*	Food quality	Menu variety	Good value	Good service	Atmosphere	Cleanliness	Convenience
DINNER HOUSES								
Applebee's	3.77	4.09	3.96	3.46	3.59	3.88	3.95	3.49
Marie Callender	3.74	4.14	4.01	3.36	3.65	3.94	3.95	3.16
Bennigan's	3.73	3.96	4.08	3.37	3.73	3.96	3.81	3.19
Chili's	3.68	3.99	3.77	3.39	3.69	3.77	3.78	3.40
Tony Roma's	3.62	4.07	3.73	3.45	3.61	3.60	3.63	3.24
The Ground Round	3.58	3.79	3.91	3.47	3.55	3.63	3.53	3.15
Fuddruckers	3.55	4.06	3.54	3.24	3.55	3.56	3.72	3.16
FAMILY DINING								
Cracker Barrel	3.89	4.12	4.11	3.77	3.92	4.02	4.01	3.30
Bob Evans	3.83	4.07	4.02	3.69	3.91	3.73	3.90	3.48
Shoney's	3.76	3.85	3.95	3.77	3.82	3.62	3.72	3.57
PoFolks	3.75	3.91	3.95	3.86	3.83	3.69	3.71	3.28
Bakers Square	3.72	4.07	4.05	3.53	3.66	3.62	3.84	3.30
Perkins Restaurants	3.68	3.85	3.96	3.53	3.62	3.60	3.71	3.46
Coco's	3.58	3.74	3.86	3.47	3.55	3.50	3.60	3.35
Country Kitchen	3.55	3.64	3.78	3.50	3.55	3.48	3.60	3.30
Denny's	3.54	3.59	3.88	3.57	3.47	3.35	3.54	3.42
Carrows	3.52	3.61	3.89	3.49	3.50	3.33	3.56	3.24
IHOP	3.48	3.70	3.75	3.53	3.51	3.28	3.35	3.21
Friendly	3.47	3.66	3.67	3.39	3.40	3.28	3.46	3.40
Big Boy	3.43	3.48	3.74	3.39	3.39	3.28	3.38	3.35
MEXICAN								
Garcia's	3.79	4.05	3.94	3.61	3.80	3.98	3.77	3.41
Chi-Chi's	3.70	3.95	3.96	3.44	3.67	3.93	3.71	3.25
Taco Bell	3.51	3.58	3.57	3.84	3.49	3.16	3.36	3.59
Taco John's	3.31	3.39	3.35	3.42	3.41	2.94	3.17	3.52
Del Taco	3.24	3.31	3.24	3.29	3.30	2.94	3.20	3.41
PIZZA								
Pizza Hut	3.60	3.98	3.55	3.39	3.55	3.51	3.59	3.62
Little Caesars	3.53	3.69	3.27	3.97	3.58	3.08	3.53	3.62
Godfather's Pizza	3.51	3.89	3.46	3.48	3.54	3.43	3.49	3.31
Village Inn	3.51	3.73	3.63	3.46	3.55	3.38	3.51	3.34
Round Table Pizza	3.48	4.01	3.44	3.26	3.45	3.21	3.48	3.55

*Overall index is the average of the seven attribute scores

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Segment/Chain	Overall index*	Food quality	Menu variety	Good value	Good service	Atmosphere	Cleanliness	Convenience
PIZZA								
Domino's Pizza	3.41	3.53	3.09	3.34	3.69	2.92	3.33	3.96
Pizza Inn	3.40	3.58	3.43	3.29	3.37	3.33	3.37	3.44
Shakey's	3.37	3.55	3.60	3.42	3.32	3.31	3.23	3.17
Sbarro	3.28	3.53	3.41	3.17	3.33	2.99	3.30	3.20
SANDWICHES								
Rax Restaurants	3.55	3.71	3.64	3.41	3.51	3.37	3.78	3.43
Subway	3.46	3.72	3.47	3.43	3.55	3.00	3.49	3.54
Arby's	3.43	3.73	3.43	3.30	3.41	3.19	3.50	3.46
A&W	3.27	3.49	3.30	3.28	3.36	3.01	3.23	3.20
SEAFOOD								
Red Lobster	3.84	4.14	4.20	3.56	3.84	3.85	3.87	3.42
Long John Silver's	3.56	3.74	3.51	3.51	3.63	3.46	3.61	3.49
Captain D's	3.54	3.69	3.55	3.50	3.64	3.36	3.60	3.47
Skipper's	3.49	3.76	3.48	3.42	3.53	3.29	3.44	3.52
STEAKHOUSES								
Golden Corral	3.87	4.08	4.10	3.89	3.93	3.70	3.80	3.60
Quincy's	3.85	4.02	4.03	3.82	3.96	3.74	3.73	3.67
Ryan's Steakhouses	3.82	4.00	4.14	3.91	3.87	3.61	3.70	3.48
Sizzler	3.81	3.98	4.11	3.75	3.77	3.70	3.78	3.58
Western Sizzlin	3.75	3.91	3.93	3.65	3.80	3.68	3.73	3.57
Bonanza	3.72	3.79	3.96	3.82	3.76	3.54	3.66	3.55
Ponderosa	3.67	3.75	3.97	3.79	3.66	3.45	3.51	3.56
SWEETS								
Baskin-Robbins	3.70	4.28	3.94	3.22	3.66	3.50	3.70	3.58
TCBY	3.64	4.20	3.55	3.28	3.68	3.40	3.81	3.56
Häagen-Dazs	3.52	4.47	3.68	2.93	3.50	3.24	3.70	3.10
Dunkin' Donuts	3.45	3.74	3.43	3.43	3.53	3.07	3.43	3.53
T.J. Cinnamons	3.44	4.25	3.21	3.14	3.63	3.16	3.45	3.27
Carvel	3.44	3.97	3.35	3.28	3.55	2.98	3.46	3.50
Dairy Queen	3.41	3.67	3.46	3.39	3.43	3.09	3.33	3.49
Mister Donut	3.38	3.60	3.31	3.31	3.51	3.11	3.41	3.41

*Overall index is the average of the seven attribute scores

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